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IN-BEARING TORQUE SENSOR ASSEMBLY

Cross-reference to Related Applications

The present application claims priority to U.S. Patent Provisional Patent Application Serial No. 60/383,945 filed May 29, 2002 entitled In-Bearing Torque Sensor Assembly, the contents of which are incorporated herein by reference.

Technical Field

In the past it has been known that the magnetic permeability of ferromagnetic materials changes when stress is applied to the material. Such a property of a material is referred to as magnetostriction. In addition, induced stress on a conductive material alters its electrical conductivity. Taking advantage of these two properties, eddy current devices have been built that sense changes in the electrical conductivity and magnetic permeability of a magnetoelastic ring press-fitted onto a shaft in order to determine the torque that the shaft is under. Shaft torque has also been measured using magnetic field sensors such as Hall and Magnetoresistive sensors and circularly polarized magnetoelastic rings press-fitted onto the shaft OD surface. As torque is transmitted through the shaft, the circular polarization of the magnetoelastic ring changes to an elliptical polarization that is detected by the magnetic field sensor placed at close proximity to the magnetoelastic ring. Thus, detection of the torque-induced elliptical polarization leads to shaft torque measurement. The present invention incorporates the above-mentioned torque measuring techniques in a unique way to measure the torque that is applied to a given shaft. A bearing that comprises of an inner race, an outer race and a plurality of rolling elements is press-fitted onto a shaft and a magnetoelastic ring is press-fitted onto the bearing inner race. As torque is transmitted through the shaft, it alters the magnetoelastic ring characteristics and a sensor in close proximity to the magnetoelastic ring measures the torque-induced changes and provides a measure of the applied torque. If an eddy current sensor is implemented, the press-fitted magnetoelastic ring is not magnetized and the sensor measures the induced changes of its magnetic permeability and electrical conductivity values, and its associated electronics provide a measure of the applied torque. If a

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magnetic sensor is implemented, the press-fitted magnetoelastic ring is magnetically circularly polarized and the sensor measures the magnetoelastic ring induced elliptical polarization, and its associated electronics provide a measure of the applied torque.

5 Summary of the Invention

The present invention comprises a device for sensing a torque applied through a shaft. The device comprises a shaft and a bearing attached to the shaft. The bearing comprises an inner race, an outer race and a plurality of rolling elements. A magnetoelastic ring is press-fit onto the inner race. An eddy current or a magnetic field sensor is placed in close proximity to the magnetoelastic ring. In the case of an eddy current sensor, the magnetoelastic ring is not magnetized. In the case of a magnetic field sensor, the magnetoelastic ring is magnetically circularly polarized. In either case, the chosen sensor senses the induced changes of the magnetoelastic ring characteristics and its associated electronics provides a measure of the applied torque.

15 Brief Description of the Drawings

Fig. 1 is a schematic showing the generation of eddy currents inside a conductive material;

20 Fig. 2 is an electrical schematic of an absolute eddy current sensor according to one embodiment of the present invention;

Fig. 3 is an electrical schematic of a differential eddy current sensor according to another embodiment of the present invention;

25 Fig. 4 is a side view of a shaft under torque indicating lines of compression and tension within the shaft;

Fig. 5 is a plot of an eddy current sensor output as a function of the shaft carrying torque according to one embodiment of the present invention;

Fig. 6 is a side view of a shaft with eddy current sensors according to another embodiment of the present invention;

30 Fig. 7 is a side view of a shaft with eddy current sensors according to another embodiment of the present invention;

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Fig. 8 is a side view of a bearing with an eddy current sensor according to an embodiment of the present invention;

Figs. 9A and 9B are side views of a shaft having a circularly polarized magnetoelastic ring press fit onto its outer diameter, a magnetic field sensor at close proximity to the magnetoelastic ring, and the generation and detection of the induced elliptical polarization due to the applied shaft torque according to an embodiment of the present invention;

Figs. 10A and 10B are side views of a shaft having a pair of circularly polarized magnetoelastic rings press fit onto its outer diameter, a pair of magnetic field sensors at close proximity to the magnetoelastic ring pair, and the generation and detection of the induced elliptical polarizations due to the applied shaft torque according to an embodiment of the present invention;

Figs. 11A and 11B are side views of a bearing with either one or more single point eddy current sensors or with one or more single point magnetic field sensors according to an embodiment of the present invention;

Figs. 12A and 12B are side views of a bearing with either one or more single point eddy current sensors or with one or more single point magnetic field sensors according to an embodiment of the present invention;

Fig. 13 is a side view of a bearing with an encircle coil eddy current sensor according to an embodiment of the present invention;

Fig. 14 is a side view of a bearing with an encircle coil eddy current sensor according to an embodiment of the present invention;

Fig. 15 is a side view of a bearing with an encircle coil eddy current sensor according to an embodiment of the present invention;

Fig. 16 is a side view of a bearing with an encircle coil eddy current sensor according to an embodiment of the present invention; and

Fig. 17 is a side view of a bearing with an encircle coil eddy current sensor according to an embodiment of the present invention.

Best Mode for Carrying Out the Invention

While the invention is susceptible of embodiment in many different forms, there is shown in the drawings and described in detail preferred embodiments of the invention. It is to be understood that the present disclosure

is to be considered only as an example of the principles of the invention. This disclosure is not intended to limit the broad aspect of the invention to the illustrated embodiments. The scope of protection should only be limited by the accompanying claims.

5 Referring to Fig. 1, the electrical conductivity (σ) of a given material provides a measure of how easily electrical currents flow through the material. Its magnetic permeability (μ) provides a measure of how easily magnetic flux lines permeate through the material. These two parameters determine the way a given material interacts with electric and magnetic fields. When a piece of
10 material 100 is exposed to an excitation coil 102 powered by an oscillator 104, magnetic flux (represented by magnetic flux lines 106) is created around the coil 102 and a magnetic field 108 is applied to the material 100. The magnetic field 108 induces eddy currents 110 in the material which create an opposing magnetic field 112. Eddy currents (EC) are circulating currents in conductive
15 materials that are produced as a result of time-varying magnetic flux passing through the material. Therefore, ECs are induced inside a conductive material that is near an electrical coil powered by an AC current. The EC generation is due to the interaction of the material's conductive electrons and the AC magnetic field that is generated around the coil by the current through it and
20 depends on the material's electrical conductivity and magnetic permeability. Referring to Fig. 3, when a ferromagnetic material, such as a steel shaft, is under torque, the material's electrical conductivity and magnetic permeability are changed in relation to the amount of torque across the material. By sensing the change in electrical conductivity and magnetic permeability, one can
25 determine the amount of torque being applied through the shaft.

Referring to Fig. 2, an absolute EC sensor 1 consists of an excitation coil 2 driven by an oscillator 4 powered by a power source 6 that, when energized, induces eddy currents inside any conductive material at close proximity to it. A sensing coil 8 senses the magnetic field generated by the induced electrical
30 currents inside the conductive material. The current generated in the sensing coil 8 by the sensed magnetic field is supplied to a bridge balancing circuit 10,

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an amplifier 12, a demodulator 14 and a filter 16 to create a sensor output 17. The generated magnetic field is determined by the path and strength of the eddy current flow, which in turn depends on the material geometry and its σ and μ local values. Thus, absolute EC sensors 1 with a single excitation/sensing element pair have been successfully used for characterization of conductive materials.

Referring to Fig. 3, a differential EC sensor has two excitation/sensing element pairs and is used primarily for the detection of small-localized metallurgical or geometrical anomalies of conductive components. Fig. 3 shows such a sensor that is similar to that of Fig. 2 but adding a second excitation element 2' and a second sensing element 8'. The excitation elements 2 and 2' of a differential EC sensor generate magnetic fields that have approximately the same amplitude and phase. However, its sensing elements 8 and 8' generate signals of approximately equal amplitude but have opposite phase.

Referring to Fig. 4, torque transmitted through a shaft 18 generates a shear stress throughout the shaft 18 that varies from zero at its center to a maximum value at its surface. Lines of tension 20 and lines of compression 22 are formed along the shaft 18 as a result of the applied torque. These torque-induced tension and compression lines 20, 22 are normal to each other and are formed at $\pm 45^\circ$ from the axis of symmetry. A magnetoelastic ring 24 that is press-fitted onto the shaft 18 would also experience the generated shear stress, and lines of tension 20 and lines of compression 22 are formed in the ring 24 as well.

The electrical conductivity (σ) and the magnetic permeability (μ) values of the magnetoelastic ring 24 are altered by the generated shear stress with the values being different along the lines of tension from those along the lines of compression (i.e. $\sigma_{\text{tension}} \neq \sigma_{\text{compression}}$ and $\mu_{\text{tension}} \neq \mu_{\text{compression}}$). Thus, a differential EC sensor placed over a pair of magnetoelastic rings 24 so that one of its excitation/sensing element pairs focuses along the lines of tension and the other excitation/sensing element pair focuses along the lines of compression

(Fig. 6), would sense the local value difference of σ and μ along the magnetoelastic ring and would provide a measure of the applied shaft torque. The relationship of eddy current response to axle torque is a generally linear relationship (see Fig. 5).

5 Referring to Fig. 7, in certain applications where high torque-sensitivity is required, knurled grooves 28 can be placed on the press-fitted magnetoelastic rings over the outside diameter surface in order to increase the EC sensor response. Under this configuration, the sensor excitation/sensing element pair that focuses on the lines of tension has knurl grooves that are placed parallel to
10 the direction of lines of tension. In the same way, the magnetoelastic ring where the sensor excitation/sensing element pair focuses on the lines of compression has knurl grooves that are placed parallel to the direction of lines of compression.

The EC sensors of the present invention may be implemented in a torque
15 sensor that detects torque by sensing ECs induced in a bearing cone pressed onto a shaft. Referring to Fig. 8, the simplest embodiment involves attaching a single excitation/sensing element-pair EC sensor 30 along with its associated electronics to a fixed position adjacent a bearing cone 25 that comprises a magnetoelastic ring 24 that has been pressed onto the rotating shaft 18. In this
20 configuration, loads or moments acting upon the torque-carrying shaft could affect the EC sensor output and thus, this type of assembly is recommended for shaft applications that carry only pure torque. Here, the shaft could have any type of shape, size, and alloy composition and have been made by any given manufacturing process.

25 Referring to Fig. 9A, a magnetoelastic circularly polarized ring 24 that is press-fitted onto a bearing cone assembly (not shown), which in turn is press-fitted onto an axle 18, will experience a shear stress on it when an axle torque is being applied and its circular polarization will change to an elliptical polarization. Prior to the applied torque, the ring's 24 circular polarization does
30 not sustain any axial magnetic field and generates circumferential magnetic flux lines M that are contained within the ring 24. Referring to Fig. 9B, as soon as

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the axle torque is applied, the ring polarization changes from circular to elliptical. The induced elliptical polarization sustains an axial magnetic field within the ring 24 whose magnitude depends on the applied torque value and generates magnetic flux lines M that emanate from one side of the ring 24 and
5 return back to it from its other side through the surrounding air. In other words, the ring's 24 sides form a magnetic pole pair. A magnetic sensor 30 such as a Hall effect sensor or a magnetoresistive sensor that is placed properly near the magnetoelastic ring 24 would sense the induced axial magnetic field and provide a measure of the applied axle torque. In certain applications where high
10 torque sensitivity and accuracy are required, more than one ring/sensor configuration could be implemented inside the bearing in order to reduce the effect that axle loads and moments could have on the torque measurement. In this configuration the magnetoelastic ring would be oppositely polarized as shown by the arrows +M and -M in Figs. 10A and 10B.

15 In the following in-bearing sensor assemblies, the use of a sensor implies either an EC sensor or a magnetic sensor unless it is otherwise stated. Also an EC sensor is coupled to a non-magnetized ring, and a magnetic sensor to a circularly polarized ring.

Referring to Figs. 11A and 11B, a single-row bearing assembly 40
20 having a cup 42 (or outer race), rollers 44, cone 46 (or inner race), roller cage 48 and bearing seals 50 is shown with a magnetoelastic ring 24 is press-fit onto the smaller diameter of the cone, with the cone 46 having been press-fit onto the shaft 18. One or more sensors 30 are placed in one or more through-holes in the bearing cup 42. The magnetoelastic ring 24 and sensor 30 could be mounted on
25 either side of the bearing seal 50, if it is incorporated in the bearing design. In the design of Figs. 11A and 11B, the sensors 30 may be absolute or differential sensors. Moreover, when differential sensors 30 are used, the single magnetoelastic ring 24 may be replaced with a pair of magnetoelastic rings 24 that may or may not be knurled.

30 Referring to Figs. 12A and 12B, the bearing assembly 40 including the cup 42, rollers 44, cone 46, roller cage 48 and bearing seals 50 may be provided with the magnetoelastic ring 24 is press-fit onto the large diameter of the cone,

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with the cone 46 having been press-fit onto the shaft 18. The magnetoelastic ring 24 and sensor 30 could be mounted on either side of the bearing seal 50, if it is incorporated in the bearing design. In the design of Figs. 12A and 12B, the sensors 30 may be absolute or differential sensors. Moreover, when differential
5 sensors 30 are used, the single magnetoelastic ring 24 may be replaced with a pair of magnetoelastic rings 24 that may or may not be knurled.

Referring to Fig. 13, the bearing assembly 40 including the cup 42, rollers 44, cone 46, roller cage 48 and bearing seals 50 and is provided with the magnetoelastic ring 24 is press-fit onto the small diameter of the cone 46, with
10 the cone 46 having been press-fit onto the shaft 18. The sensor 54 takes the form of an encircle-coil EC sensor that is not attached through a through hole in the cup 42, but rather is attached to an inside diameter of the cup 42 and electrically connected to the sensor connector 30. Referring to Fig. 14, the design of Fig. 13 may be altered such that the magnetoelastic ring is press-fit
15 onto the large diameter of the cone 46 and the sensor connector 30 and the encircle-coil EC sensor 54 are installed into the cup 42 over the magnetoelastic ring 24. The EC sensor 54 of Figs. 13 and 14 may be an absolute or a differential EC sensor. If the EC sensor 54 is a differential sensor, the magnetoelastic ring 24 may be replaced with a pair of magnetoelastic rings 24
20 that may or may not be knurled.

Referring to Fig. 15, the bearing assembly 40 including the cup 42, rollers 44, cone 46, roller cage 48 and bearing seals 50 and is provided with the magnetoelastic ring 24 is press-fit onto the small diameter of the cone 46, with the cone 46 having been press-fit onto the shaft 18. An encircle-coil EC sensor
25 54 is mounted to the cup 42, not through a through-hole within the cup 42, but rather to a counterbore 56 within the cup 42. The encircle-coil EC sensor 54 within the counterbore 56 is electrically connected to the sensor connector 30. The electrical connection from the sensor 54 exits the bearing assembly 40 either axially from a connector 30 located on the sensor outer side between the
30 bearing cup 42 and bearing cone 46 or through a radial groove on the side of the cup 42. Referring to Fig. 16, the magnetoelastic ring 24 can be press-fit onto the large diameter of the cone 46 and the encircle-coil EC sensor 54 attaches to

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an inside diameter of the cup 42 over the magnetoelastic ring 24. The magnetoelastic ring 24 and sensor connector 30 are mounted on the outer side of the bearing seal 50 if it is incorporated in the bearing design. Once again, the sensor 54 may be an absolute or a differential sensor, the magnetoelastic ring 24 may be a pair of magnetoelastic rings and the ring(s) 24 may be knurled.

Referring to Fig. 17, the design of Figs. 15 and 16 may be altered so that the encircle-coil EC sensor 54 mounts within a counterbore in the seal 50. Furthermore, it should be appreciated one of ordinary skill in the art that while the present invention has been described with respect to single-row bearings and tapered bearings that the concepts of the present invention also apply to multiple row bearings and bearings with rolling elements other than tapered rollers (such as ball bearings).

While the specific embodiments have been illustrated and described, numerous modifications come to mind without significantly departing from the spirit of the invention, and the scope of protection is only limited by the scope of the accompanying claims.